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ABSTRACT

Guidelines of a four-phase model for conducting leadership conferences are outlined. Phase I focuses on initial conference planning, including (1) identifying need and purpose for the conference; (2) selecting a conference chairperson; (3) forming the conference planning committee, listing suggested committees and their responsibilities (program, brochure and application, participant selection, registration, publicity, finance, vendors, facilities, and evaluation committees); and (4) convening the conference planning meeting, including reviewing the purpose of the conference, identifying clientele, selecting conference dates and facility (advantages and disadvantages of hotels/motels; convention/conference centers; resorts, retreats, lodges, and parks; schools, colleges, and community centers), developing conference objectives, conducting a needs assessment, formulating a conference program, setting committee assignments, establishing a time line, and wrapping up the session. Phase II focuses on interim conference planning, providing guidelines related to the 9 previously named committees. Activities during the conference itself are discussed in Phase III and Phase IV and post-conference activities in Phase IV. A list of additional resources, sample planning checklist, session evaluation form, and conference evaluation form are provided. (SK)

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Conference Model: Guidelines... for science supervisors on how to conduct a successful leadership conference

By

Robert V. DeBlasi

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NATIONAL SCIENCE SUPERVISORS ASSOCIATION

A DIVISION AFFILIATE OF THE NATIONAL SCIENCE TEACHERS ASSOCIATION

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Introduction

PRESIDENT

Gary E. Downs
Associate Professor
N126 Quadrangle
Iowa State University
Ames, Iowa 50011

The planning and offering of successful leadership conferences for science supervisors is a challenging task. Many science supervisor's positions may require the educators to plan and offer leadership conferences.

This prepared manual should provide considerable help to the science supervisor with the major items and minute details needed to address in order to have a successful leadership conference.

A model using four phases is suggested. Within the four phases wise usage of nine working committees is suggested to achieve the written objectives for the planned conference. The model provides for input to be used during the operation of a conference which allows for necessary changes to be made. Thorough follow-up and evaluation procedures are suggested.

Leadership responsibilities are among the most important functions that science supervisors perform. This manual should provide tremendous help for any science supervisor who is planning to offer a leadership conference.

Gary E. Downs
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RDB
March 1982

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CONFERENCE MODEL: GUIDELINES FOR SCIENCE SUPERVISORS ON HOW TO CONDUCT A SUCCESSFUL LEADERSHIP CONFERENCE

As leaders in science education, supervisors and chairpersons provide a critical function in the total process of educating our nation's students and providing direction to science teachers. However, effective science supervision depends on a well-informed, competent leader especially during this period of time of changing job responsibilities. One method of providing continued leadership training that will offer experiences to meet the supervisor's needs in implementing changing roles and job responsibilities is the leadership conference.

The project staff of the National Science Supervisors Association Northeast Regional Summer Leadership Conference utilized a successful conference planning model that can be of value to other supervisors. This model consisted of four phases:

Phase I - Initial Conference Planning
Phase II - Interim Conference Planning
Phase III - Conference
Phase IV - Post Conference

Funded under the National Science Foundation's Information Dissemination for Science Education Program (NSF Grant #7909594), the conference was held in August of 1980 at the Pocono Environmental Education Center, Dingmans Ferry, PA.

Success is not inherently guaranteed to conference planners. A successful conference requires hard work, diligent and direct planning, multi-lateral planning, and most importantly, peer participation. In effect, nothing should be left to chance or to the whims of a few planners!

This conference planning model is designed as a guide for planners of future science leadership conferences. It may be used in part or in total. The Conference Model: Guidelines are presented in a sequence of suggested

activities for each of the four phases of the conference planning model. Conference planners will no doubt grasp the "feeling" of each phase and are encouraged to modify the suggestions to meet local requirements.

PHASE I - INITIAL CONFERENCE PLANNING

A. Identify a Need and Purpose for the Conference

The key to any successful conference is that it answers the question "WHY?". Leadership conference planners must be cognizant of the need for a conference. There are a variety of sources that can provide that information: (a) the NSSA Executive Committee, (b) the NSSA Regional Director, (c) executive committees of state and local supervisory associations, (d) state science consultants/supervisors, and (e) supervisory organization membership responses. Be positive that a genuine need and purpose exist before initiating the conference planning process.

B. Select a Conference Chairperson

Any organized function is only as effective and efficient as its organizers. The conference chairperson is the chief organizer who should possess the qualities needed to "move and shake" the conference committee and the conference planning process throughout its four phases. Select from among the potential candidates one who has the leadership ability, time, and stamina to oversee the entire process. The chairperson should be responsible for:

* Selecting competent people to serve as members of the Conference Planning Committee.
* Appointing members to chair each of the working committees.
* Establishing the Conference Planning Committee meeting agenda.
* Initiating the formation of a needs assessment study.

* Presiding over the Conference Planning Committee meeting.
* Assigning tasks to each working committee.
* Coordinating all working committees throughout each phase.
* Assisting working committees as needed.
* Reviewing and approving Finance Committee Budget.
* Preparing master Gantt Chart.
* Receiving all conference participant application forms.
* Selecting conference participants through Participant Selection Committee.
* Notifying all conference applicants whether they were selected or not selected as participants.
* Sending letters of appreciation to all who made the conference a success.
* Reviewing conference evaluation data and making recommendations to Conference Planning Committee for its publication and distribution.
* Overseeing development of Conference Proceedings.

C. Form the Conference Planning Committee

The Planning Committee represents the "brain trust" for the conference planning process. Each committee chairperson will be assigned the responsibility of accomplishing key tasks. The number of members depends upon the type and variety of tasks required, i.e. program, brochure and application, participant selection, registration, publicity, finance, vendors, facilities, and evaluation. The following is a listing of suggested committees and their responsibilities:

1. Program Committee
   * Submits budget to Finance Committee.
   * Blocks out conference daily schedule.
   * Refines list of generated conference topics from needs assessment study.
   * Obtains program presenters via phone contacts or letters.
   * Develops and sends letters requesting persons as program presenters.

* Maintains communication with program presenters.
* Negotiates honorariums for program presenters.
* Arranges honorarium payments through Finance Committee.
* Forwards information to Publicity Committee.
* Obtains a chairperson for each presenter's program.
* Prepares a conference program.
* Coordinates special social events with Facilities Committee.
* Arranges for printing of conference program.
* Arranges for presenters' room and board through Facilities Committee.
* Coordinates special travel arrangements for presenters.
* Attends to presenters' needs during conference.
* Arranges for conference needs (meeting rooms, equipment, seating, etc.) with manager of conference facility.
* Maintains daily, master program during conference.
* Develops and sends thank you letters to conference presenters.
* Reviews conference evaluation data.
* Develops and distributes Conference Proceedings.
* Submits bills for payment to Finance Committee.

2. <u>Brochure and Application Committee</u>
   * Submits budget to Finance Committee
   * Develops conference brochure.
   * Develops participant application form after confirming with Participant Selection Committee.
   * Arranges for printing of conference brochures and application forms.
   * Obtains mailing labels from professional organizations and commercial mailing list services.

* Mails conference brochures and application forms.
* Submits bills for payment to Finance Committee.

3. Participant Selection Committee
   * Submits budget to Finance Committee.
   * Develops process and criteria for participant selection.
   * Develops participant application form with Brochure and Application Committee.
   * Develops process for screening and selecting conference participants.
   * Selects, along with Conference Chairperson, conference participants.
   * Assists Conference Chairperson develop letters notifying applicants who have been selected and those who have not been selected.
   * Submits bills for payment to Finance Committee.

4. Registration Committee
   * Submits budget to Finance Committee.
   * Develops process for registering conference participants.
   * Receives all conference participant registration fees.
   * Forwards all registration fee checks to Finance Committee.
   * Develops conference registration forms.
   * Assembles conference registration materials packet.
   * Arranges for registration area needs (tables, chairs, etc.) during the conference with the manager of the conference facility.
   * Prepares registration list of conference participants.
   * Prepares necessary signs for registration area.
   * Registers all conference participants.
   * Distributes all conference materials (registration materials packet, room assignments, name tags, meal functions, conference program, etc.) to participants.

* Submits bills for payment to Finance Committee.

5. Publicity Committee

* Submits budget to Finance Committee.
* Assembles conference information from all committees.
* Prepares and sends initial conference news releases.
* Prepares and sends conference news releases periodically as conference time approaches.
* Develops plan for obtaining summaries of conference presenters' programs.
* Arranges for publication of all selected summaries of conference presenters' programs.
* Prepares and sends post conference news releases.
* Submits bills for payment to Finance Committee.

6. Finance Committee

* Establishes a process and procedure for maintaining a sound fiscal accounting of all conference monies.
* Confers with the Conference Chairperson and Committee Chairpersons regarding their budgetary requirements.
* Prepares preliminary budget.
* Presents preliminary conference budget for approval by Conference Chairperson; preliminary budget then becomes finalized conference budget.
* Establishes conference checking account.
* Obtains necessary fidelity bonding as required.
* Establishes and maintains conference accounting books.
* Develops all required forms and vouchers.
* Receives all registration fee checks and deposits them in account.
* Receives all committee bills and disburses payment checks.
* Submits periodic financial statements to Conference Chairperson and Conference Planning Committee.

* Arranges for periodic and final auditing of conference financial records.
* Arranges for the closing of conference accounts and disposition of unused funds.
* Sends final report of conference financial status to Conference Chairperson.

7. Vendors Committee
   * Submits budget to Finance Committee.
   * Arranges details (space, location, rental fees, etc.) for exhibits with manager of conference facility.
   * Prepares a floor plan of exhibit area.
   * Establishes exhibit fee schedule.
   * Develops letter of agreement between project and vendors.
   * Develops letters for soliciting vendors and fliers advertising conference.
   * Develops information sheet (number of tables, utilities needed, special requests).
   * Develops mailing list of potential exhibitors.
   * Mails letters and fliers to vendors.
   * Solicits money support from vendors for special conference functions.
   * Assigns exhibit space.
   * Maintains master exhibitor's floor plan.
   * Prepares and sends letter of confirmation (exhibit hours, table numbers, etc.) to participating vendors.
   * Forwards vendors' fee checks to Finance Committee.
   * Arranges for vendor registration and prepares registration and materials packet.
   * Coordinates "set up" of exhibits.
   * Maintains close contacts with and attends to the needs of vendors throughout conference.
   * Submits bills for payment to Finance Committee.

8. Facilities Committee
   * Submits budget to Finance Committee.
   * Develops criteria for selecting conference site based on total conference needs.

* Develops list of potential conference sites.
* Visits potential conference sites and confers with managers.
* Submits conference site recommendations to Conference Planning Committee for final selection.
* Confers with each Committee Chairperson regarding specific needs.
* Negotiates contract with manager of conference site, subject to approval of Conference Chairperson.
* Arranges for specific social events; confers with Program Committee.
* Liaison between conference committees and conference facility manager; attends to arrangements as requested by committees.
* Arranges for specific security requirements (overnight surveillance of exhibit area, participant registration badge check, etc.).
* Arranges for posting of signs throughout conference site.
* Coordinates meeting room arrangements with conference facilities manager.
* Coordinates special travel arrangements.
* Selects menus for all meal functions.
* Arranges for rentals or reservations of requested equipment.
* Coordinates all overnight room assignments with conference facilities manager.
* Collects all materials at end of conference.
* Submits bills for payment to Finance Committee.

9. Evaluation Committee

* Submits budget to Finance Committee.
* Confers with Conference Chairperson and each Committee Chairperson regarding specific evaluation items.
* Develops preliminary evaluation instruments (over-all conference and each presenter's program) for approval by Conference Planning Committee.
* Arranges for printing of evaluation instruments.
* Establishes a process for distributing and collecting evaluation instruments.

* Transfers evaluation data into statistical format.
* Presents conference evaluation data to Conference Planning Committee.
* Arranges for publication and distribution of conference evaluation data as directed by Conference Planning Committee.
* Submits bills for payment to Finance Committee.

D. Convene the Conference Planning Meeting

The Conference Planning Committee attends to specific tasks during the conference planning meeting. These include:

1. Reviewing purpose of conference.
2. Identifying clientele.
3. Selecting conference dates and facilities.
4. Developing conference objectives.
5. Conducting a needs assessment.
6. Formulating the conference program.
7. Setting committee assignments.
8. Establishing a time line.
9. Wrapping up the session.

Inclusively, these tasks will form the agenda for the meeting:

1. Review the purpose of the conference

From information and data provided by a variety of sources, the Planning Committee reaches consensus on the conference's purpose. It will remain the guiding theme for selecting clientele, setting objectives, and establishing the program. Examples may be:

. To provide a leadership conference that will offer experiences to meet the needs of science supervisors in implementing their changing job roles and responsibilities.

or

. To provide a leadership conference that will focus on the role of the science supervisor in supervising programs for students with special needs (gifted and talented, handicapped, special education).

2. Identifying clientele

Who will benefit most from the stated purpose of the leadership conference? Brainstorm all the possible job title combinations; for example, supervisors K-12, supervisors 9-12, supervisors K-8, department chairs, general area supervisors, coordinators, consultants, principals, assistant superintendents, directors of field centers, resource teachers, teachers preparing for supervisor's certification, etc. These positions can be representative of all levels of instruction from kindergarten through college and from both public and private institutions.

3. Selecting conference dates and facility

The conference dates should be selected with a number of concerns in mind. Do they conflict with:

- Local school calendars, holidays or professional days?
- National, regional, state, county, and local conventions or conferences?
- Schedules of Conference Planning Committee members?

A number of variables will affect the choice of a conference facility. Four types of facilities may be considered: (a) hotels and motels, (b) conference and convention centers, (c) resorts and retreats, and (d) schools, colleges, and community centers. Each has advantages and disadvantages. Variables to be aware of are:

- Cost.
- Site features-number and size of meeting rooms, recreation, accessibility.
- Type of setting.
- Food services (on site, catered, buffet, or banquet style).
- Transportation to and from conference

workshop site (public/mass transit or car pooling potential).

- Support services- copy services, secretarial, and audio-visual equipment.
- Length of conference.
- Time of year.
- Number of participants.

Initial contacts between the Facilities Committee and conference facilities' managers should yield a list of requirements which will highlight one type of facility over another. Trade-offs relative to site selection will invariably result.

Consideration should be given to each of the four types of facilities with a view toward their advantages and disadvantages.

a. Hotels and Motels

Advantages

- Abundant and everywhere.
- Staffed by people experienced in managing group events such as conferences.
- Usually have a combination of large and small meeting rooms.
- Have suitable equipment such as public address systems, screens, chairs, tables, podia,and projectors.
- Sufficient sleeping accommodations to reduce hassles both logistical and political.
- In cities close to entertainment, restaurants, rental firms, secretarial pools, and other support services.
- Accessible by car, airport limousine, or public transportation.
- Convenient and efficient to Conference Planning Committee because they offer meeting, eating and sleeping facilities under one roof.

Disadvantages

- Expensive.
- Privacy may be minimal due to potential presence of other groups.
- Proximity to urban centers may provide too much distraction.

- May be too formal and/or impersonal.
- While audio-visual equipment may be on hand, rental fees are expensive and staff to operate equipment minimal and/or expensive.

b. Convention Centers and Conference Centers

Advantages

- Facilities environment designed to enhance learning.
- Facilities equipment and personnel are conference oriented.
- Vacationers and/or transient guests usually not a problem.
- Usually offer full access to recreational activities such as swimming, golf, and tennis.
- Capable of accommodating large groups.
- Equipment, recreation and food services provided on site.

Disadvantages

- Usually the most expensive facilities for conferences.
- Can be too formal for some kinds of conferences.
- Presence of other groups can be distracting.
- Recreational facilities can be distracting if conference is strictly informational.
- Entertainment rarely provided.
- May be inappropriate for smaller conferences.

c. Resorts, Retreats, Lodges, Parks, and Camps

Advantages

- Privacy, seclusion, respite from phone calls, television, and traffic, particularly during "off season".
- Usually situated in natural areas.
- Encourages participants to get acquainted.
- Relaxing.
- Encourages conference participants to experience "non-informational" agendas critical to many leadership development conferences.

- During "off season" can be inexpensive, flexible, willing to make accommodations.
- Can provide inducement for participants to attend the conference.

Disadvantages

- Remote settings can be difficult to find.
- Expensive to get to, and in northern clime may be unpredictably accessible in winter.
- Usually too far from other facilities to house overflow conference participants.
- If not designed for conferences, then usually lacking are audio-visual equipment, appropriate meeting rooms (size and number), and sufficient number of single bedrooms.
- Most close at conclusion of the business day; conference participants left to fend for themselves.

d. Schools, Colleges, and Community Centers

Advantages

- Most facilities inexpensive to use.
- Some facilities designed specifically for learning and workshops.
- Equipment (audio-visuals, food, facilities, recreation) usually available at most.

Disadvantages

- Classroom environments sometime provide a very uncomfortable workshop setting.
- Spartan, dormitory style, and often minimal numbers of personal rooms.
- Food service limited; sometimes quality questionable.
- Site staff frequently inexperienced.

4. Developing conference objectives

Objectives relate directly to the conference's purpose. The overall theme sets the direction for the Conference Planning Committee as it reaches consensus on conference objectives.

An example may be:

Purpose: To provide a leadership conference that will offer experiences to meet the needs of science supervisors in implementing their changing job roles and responsibilities.

Objectives: This conference will enable participants to improve their supervisory skills by:

Increasing leadership skills in selected techniques and strategies of:

- Teacher evaluation.
- Interpersonal relationships.
- Effective management.
- Planning and evaluation.
- Accommodating needs of special groups of students.

Examining trends in science curriculum relating to:

- Funding for curriculum development and implementation.
- Issues confronting curriculum developers.
- Technology in curriculum implementation.
- Science in a "back-to-basics" world.

Providing enriched social and professional sharing experiences among science leaders from the northeastern United States.

5. Conducting a needs assessment

In order to provide a worthwhile program for the conference participants and one related to the conference's purpose and objectives, a carefully planned needs assessment is in order. Current, interesting and intellectually stimulating topics can be obtained through a survey of the membership or a poll of supervisors in the area. The Conference Planning Committee also brainstorms a list of topics for consideration. Some topics may be as follows:

- Teacher evaluation strategies.

- Stress and burnout.
- Science for the handicapped.
- Conducting effective meetings.
- Budgeting techniques.
- Seeking funding sources.
- Techniques for increasing enrollments.
- Use of micro computers.
- Future trends in science education.
- Self assessment.
- Safety and liability.
- Relating research to the classroom.
- Developing effective K-6 science programs.
- Applying management skills to science education.
- Teaching the basics through the content area of science.
- Formats for staff development.

6. Formulating conference program

Referring to the list of possible conference topics generated during the needs assessment, the Conference Planning Committee selects, in priority order, those topics which will form the actual conference program. Whatever priority order selection process is used, the Conference Planning Committee makes the selections by keeping in mind that the final list of topics must directly relate not only to the conference's purpose and goals but also to the needs of the identified clientele.

Once consensus is reached on the topics for inclusion into the program, Planning Committee members generate a list of potential presenters for each topic. The names are later presented to the Program Committee. Tentative program topics should be considered due to the possible unavailability of specific potential presenters.

7. Setting committee assignments

As stated under the section, Form the Conference Planning Committee, this committee is composed of the Conference Chairperson and the Committee Chairpersons. The Conference Chairperson reviews each of the committee responsibilities and emphasizes the working relationship among them. Each committee chairperson reviews the committee's responsibilities and identifies people who will serve on that committee. Time is provided for the committee chairpersons to formulate plans and begin working on their responsibilities. Before this initial planning meeting terminates, a few key responsibilities should be firmed up. They include:

- Tentative blocked-out daily program.
- Tentative conference budget.
- Criteria for brochure and application.
- Criteria for selecting participants.
- Preliminary publicity information.
- List of potential vendors to contact.
- List of potential facilities to contact.

8. Establishing a time line

A realistic time line is established that provides a comprehensive view of the tasks required, the persons responsible, and the completion date for each. The Gantt Chart is an excellent vehicle for visually displaying this information. Two types of Gantt Charts should be constructed; one containing critical tasks and deadlines kept by the Conference Chairperson and one containing key tasks and deadlines kept by each Committee Chairperson. Appendix 1 shows a sample Gantt Chart for the Conference

Chairperson and Appendix 2 shows a sample Gantt Chart for the Program Committee Chairperson.

9. Wrapping up the session

Each Committee Chairperson reviews the work completed on the assigned tasks and presents a completed Gantt Chart. The Conference Chairperson and other Committee Chairpersons listen to each presentation and note any conflicts in tasks and deadlines. Adjustments are made accordingly. The Conference Planning Committee adjourns and begins working on committee tasks.

Importance of Phase I

Phase I of the conference planning model is the most critical of all phases. A well-planned conference will insure a successful one for the planners, the presenters, and most of all for the participants.

PHASE II - INTERIM CONFERENCE PLANNING

During the Interim Conference Planning Phase, Committee Chairpersons will have established their committees and begun to work at their assigned tasks. The Conference Chairperson is busy checking with each chairperson on a regular basis.

In addition to the many responsibilities that the committees must attend to during this phase, the Conference Planning Committee should firm up a number of key assignments. These should include:

A. Program Committee

1. Refine the daily program schedule keeping in mind the following:
   - Allow sufficient time for each presentation. Don't over schedule.
   - Consider possibilities of presenting sessions; for example, single sessions for all participants, concurrent sessions, or repeat sessions.

- Block in meal functions, breaks, receptions, exhibit viewing time, and other events.
- Consider open-ended rap sessions and follow-up sessions.
- Consider sessions to discuss information presented in previous session(s).
- Allow for free time, possibly a mid-conference break for a whole afternoon and/or evening.
- Avoid scheduling presentations late in the evening.
- Allow for time to have participants "mingle and mix".
- Schedule recreational activities.

2. Contact program presenters being sure to mention:
   - The event's sponsor, purpose, date(s), and location.
   - Background information about the organization.
   - The presenter's topic, date, and time of presentation.
   - Audience profile.
   - Honorarium and/or expenses,
   - Travel, room and board arrangements.
3. Confirm details with presenters including:
   - Confirmation of terms and conditions.
   - Exact title of presentation.
   - List of audio-visual equipment needed.
   - Biographical information.

B. <u>Brochure and Application</u>

1. Develop a conference brochure which should include the following information:
   - Front cover should include name of sponsoring organization, names of job titles (clientele) for whom conference is planned, dates, location, and organization logo.
   - Purpose and objectives.
   - Exact times and dates from registration time to departure time.
   - Brief overview of type and caliber of program presenters.

- Listing of suggested program topics.
- Registration details should include number of participants being considered, specific job titles included in clientele, deadline for receiving registration form, and deadline for notification of acceptance.
- Travel arrangements should be described; such as, travel allowances (approximate reimbursement if known), consideration of a sliding scale allowance for carpooling, and description of alternate methods of travel.
- Credits: certificate of attendance (can be submitted to local district to qualify for in-service credit), college or university credits.
- Accommodation information should include details about room and board arrangements at conference facility.
- Name, address, and phone number of contact person for direction of questions and information.

2. Develop a participant application form which can be either printed as part of the conference brochure or inserted in it. It should include:
   - Participant information: name, position, home/school address, and telephone number.
   - Statements which require narrative information about the person's present position and responsibilities, professional background,and how he/she plans to use the knowledge and skills acquired at the leadership conference.
   - Signature of applicant and the date.
   - Name, address, and phone number of person to whom application form should be returned.
3. Obtain mailing labels from professional organizations, including NSTA registry.

C. <u>Participant Selection Committee</u>

1. Develop a participant selection process that is based on specific objective criteria.
2. Select the conference participants and present names to the Conference Chairperson for approval and notification.

D. Conference Chairperson

1. Notify applicants who have and have not been selected.

2. Keep in constant contact with each Committee Chairperson and assist as needed.

E. Registration Committee

1. Prepare and receive the conference registration forms. Information should include:

   - Participant information: name, position, home/school address, and telephone number.
   - Deadline for returning form.
   - Approximate round trip mileage (if travel allowance is given).
   - Itemized registration fee schedule (may include room and board, tuition, materials, and activity fees).
   - Special needs information: smoker or non-smoker room assignment, special diet requirements, etc.
   - Signature of applicant and the date.
   - Name, address, and phone number of person to whom registration form should be returned.

2. Prepare and send packets of registration materials. Information should include:

   - Cover letter with details.
   - Directory of participants.
   - Directory of conference staff (committee chairpersons and members).
   - Preliminary conference daily schedule.
   - Map tracing travel routes to the conference site.
   - Details about the conference facility.
   - Receipt for registration fees.

F. Publicity Committee

1. Prepare and send news releases to NSSA, NSTA, regional, state, and local professional organizations, science education publications' editors.

2. Prepare news releases during and after completion of conference.

G. Finance Committee

1. Prepare a working budget based on the preliminary requests established at the Conference Planning Meeting. Included should be accounts for:

Receipts

- Registration fees.
- Vendors' fees.

Disbursements

- Honorariums.
- Travel allowances.
- Room and board.
- Coffee breaks.
- Receptions.
- Printing and duplicating.
- Postage and mailing.
- Secretarial/clerical.
- Telephone.
- Mailing labels.
- Rentals (a.v. equipment, etc.).
- Staff stipends.
- Miscellaneous.

2. Develop an approved accounting system for receiving and disbursing funds.

H. Vendors Committee

1. Contact vendors being sure to mention:

- The event's sponsor, purpose, objectives, dates, and location.
- Number and demographic information about the clientele to be served by the conference.
- Reason for exhibiting and types of exhibits.
- Exhibit fee schedule.
- Details about exhibit area at the conference facility; such as, available space, exhibit area in relation to conference area, special needs (utilities), and security arrangements.
- Tentative conference program: meeting time, break time, free time, and exhibit time.
- Name, address, and phone number of conference contact person.

2. Confirm details with vendors including:
   - Confirmation of terms and conditions.
   - Receipt of vendors' fees and signed agreement.
   - Space assignment and location.
   - Details for setting up and dismantling exhibit.
3. Prepare and send packet of registration materials.

I. Facilities Committee

1. Negotiate a contract with the facility's manager.
2. Confer with the Conference Chairperson, Program Committee, and Vendors Committee to finalize room assignments and special needs requests (utilities, seating arrangements, audio-visual equipment needs, etc.).
3. Coordinate room assignments with the facility's manager.

J. Evaluation Committee

1. Prepare the evaluation instruments. These may include one for evaluating each conference session and one for the overall conference. Refer to the Appendix for sample evaluation instruments: Session Evaluation (Appendix 3) and Conference Evaluation (Appendix 4).

Importance of Phase II

All the contacts, selections and organizational ground work tasks are attended to by all the committees during Phase II. Flexibility will be required by all as adjustments and modifications will no doubtedly be made throughout this period.

PHASE III - CONFERENCE

The conference phase represents the culmination of the Conference Planning Committee's efforts. Committees work together to insure a smoothly run, efficiently working leadership conference throughout this period.

A quick reference to each Conference Planning Committee member's responsibilities will provide the leadership conference planner with a review of some of the tasks

which must be attended to during the Conference Phase. The bulk of the work is shouldered by the Program, Registration, Vendors, and Facilities Committees.

Time should be scheduled throughout the Conference Phase for the Conference Chairperson and Committee Chairpersons to meet and review the day's activities. A review can also be accomplished on a continuous basis by the Conference Chairperson with each Committee Chairperson as the need dictates. However, a committee meeting at the end of the day can provide a quick, comprehensive evaluation. Modifications and revisions can be suggested and planned for the next day's program.

Leadership conference planners should consider the appointment of a conference ombudsman. This person can either be selected by the participants or appointed by the Conference Chairperson to act as a mediator between the participants and the Conference Planning Committee. Conference participants can approach this person and discuss their concerns and needs relating to a variety of areas, i.e., add an additional rap session, break early on a given day for a recreation time, provide a special early morning program for bird watchers, adjust the air conditioning in a particular meeting room, etc. The ombudsman relays this information to the Conference Chairperson and Planning Committee for consideration and action. Experience has proven that a conference ombudsman is an invaluable asset to a successful leadership conference.

Importance of Phase III

As the leadership conference proceeds on its own inertia during Phase III, the pace becomes hectic and one of organized precision. Committee members work together to insure a successful leadership conference. Patience and flexibility are needed by all in order to adjust to the many unforseen and planned events that arise during this period.

PHASE IV - POST CONFERENCE

Review and assessment should be the focus of the Conference Planning Committee during this final phase of the conference planning model.

Of critical importance is a survey of the tabulated session and conference evaluation data presented by the summary. Copies of the proceedings can be made available to all conferees: committee members, participants, and presenters. The document could even be made available (for a small fee) to other science supervisors through advertising and distributing by the parent organization.

Finally, the Conference Chairperson should prepare a summary report of the leadership conference to the sponsoring organization.

Importance of Phase IV

This phase is just as important as those that preceded it. A general accounting of the effectiveness of the conference and its future implications to the sponsoring organization are critical. The evaluation of the data and the dissemination of the information can provide a needed professional service to the organization's membership. Future goals and types of services can be planned with a greater degree of accuracy.

CONCLUSION

Leadership conferences for science supervisors can provide a greatly needed service. The National Science Supervisors Association and its affiliate state supervisory organizations encourage their members to become actively involved in the sponsorship and the implementing of similar conferences. The Conference Model, hopefully, will provide future conference planners with a practical guide for achieving that goal.

ADDITIONAL RESOURCES

A Conference and Workshop Planners Manual by Lois B. Hart
and
J. Gordon Schleicher

Available form: AMACOM
American Management Associations
135 West 50th Street
New York, New York 10020

This manual presents a systems approach to the complete planning of conferences and workshops.

Conference Planning, edited by W. Warner Burke
and
Richard Beckhard

Available from: University Associates
1596 Eads Avenue
La Jolla, California 92037

This book is a collection of articles that presents an overview of the basic principles of conference planning.

Convention Liaison Manual, edited by Virginia M. Luft

Available from: American Society of Association Executives
1101 16th Street, N.W.
Washington, D.C. 20036

This publication is written for organizations, convention bureaus, and hotels that host conventions. It is essentially a packet of checklists covering the arranging details.

Planning, Conducting, and Evaluating Workshops by
Larry Nolan Davis
and
Earl Mc Callon

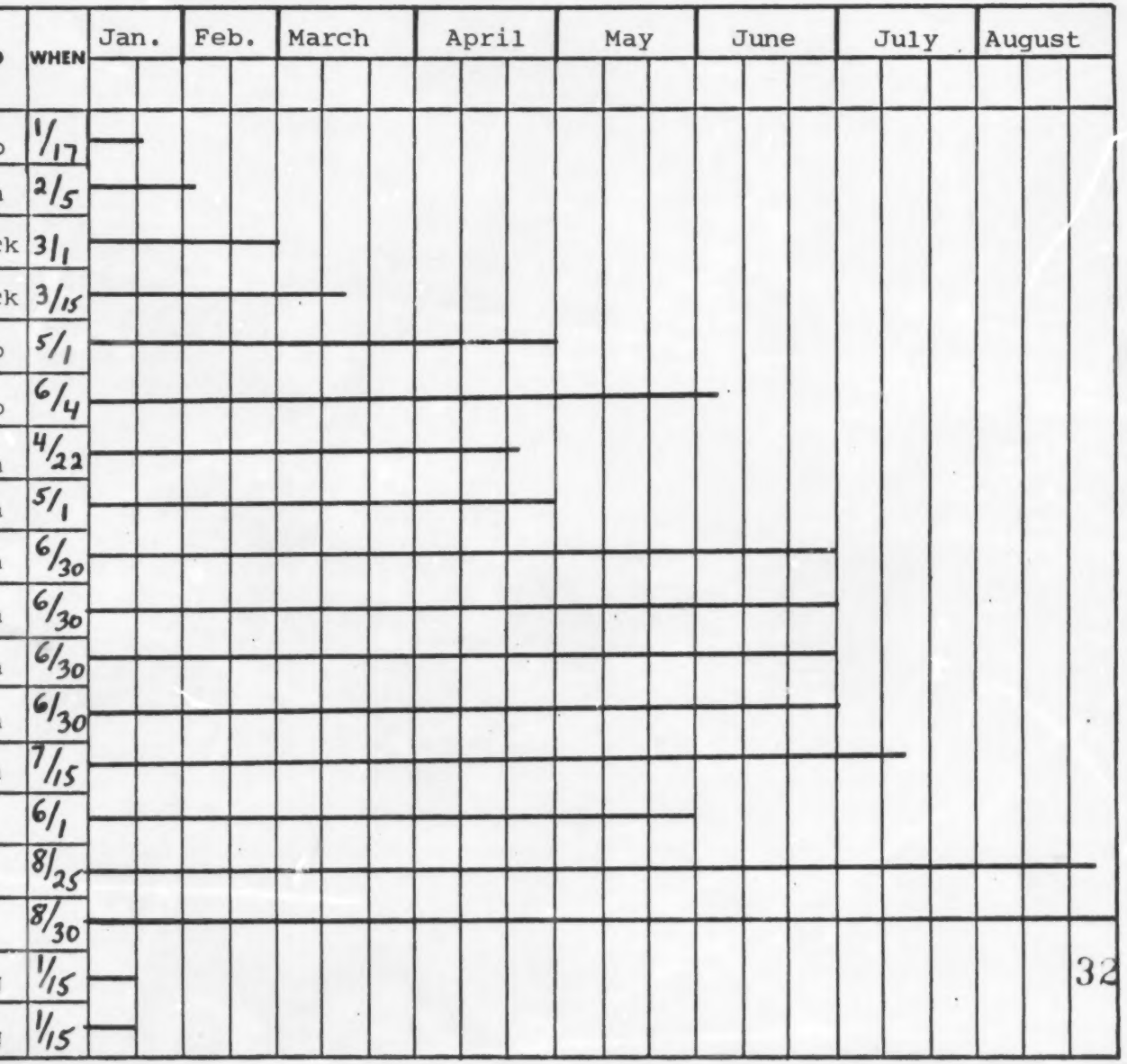
Available from: Learning Concepts 1974
2501 N. Lamar
Austin , Texas 78705
or
University Associates
1596 Eads Avenue
La Jolla,California 92037

Specifically addressed tc workshop planners, this reference draws heavily from learning theory in its approach to achieving desired behavioral outcomes. Good sections on learning methods, instructional aids, and group dynamics.

Conference Chairperson

Sample Gantt Chart

	WHAT	WHO	WHEN
Brochure Application	Obtain mailing labels	Bob	1/17
	Prepare layout	Don	2/5
	Printing	Jack	3/1
	Mailing	Jack	3/15
Selection Registra.	Select and notify	Bob	5/1
	Mail registration materials	Bob	6/4
	Prepare registration forms	Don	4/22
Program	Preliminary program	Don	5/1
	Obtain speakers	Don	6/30
	Speakers' letters-confirm	Don	6/30
	Speakers' information	Don	6/30
	Final arrangements-speakers	Don	6/30
	Print program	Don	7/15
Eval.	Develop instruments	Al	6/1
	Summarize data	Al	8/25
	Planning Committee report	Al	8/30
Pub.	Releases to NSSA publications	Peg	1/15
	Releases to NSTA publications	Peg	1/15



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Program Committee Chairpersons

Sample Gantt Chart

WHAT	WHO	WHEN
Block out conference schedule	All	5/1
Submit budget	Don	1/15
Obtain speakers	All	6/30
Send confirmation letters	Don	6/30
Request speakers' information	All	6/30
Develop preliminary program	All	5/1
Information to Publicity Committee	Ev	6/30
Print final program	Don	7/15
Final arrangements-speakers	Don	6/30
Travel arrangements-speakers	Bud	7/30
Honoraria payments	Don	8/15
Review evaluation data	All	8/30
Submit bills to Finance Committee	Don	8/30
Prepare Conference Proceedings	All	11/15
Print Conference Proceedings	Don	11/30
Distribute Proceedings	Don	12/15
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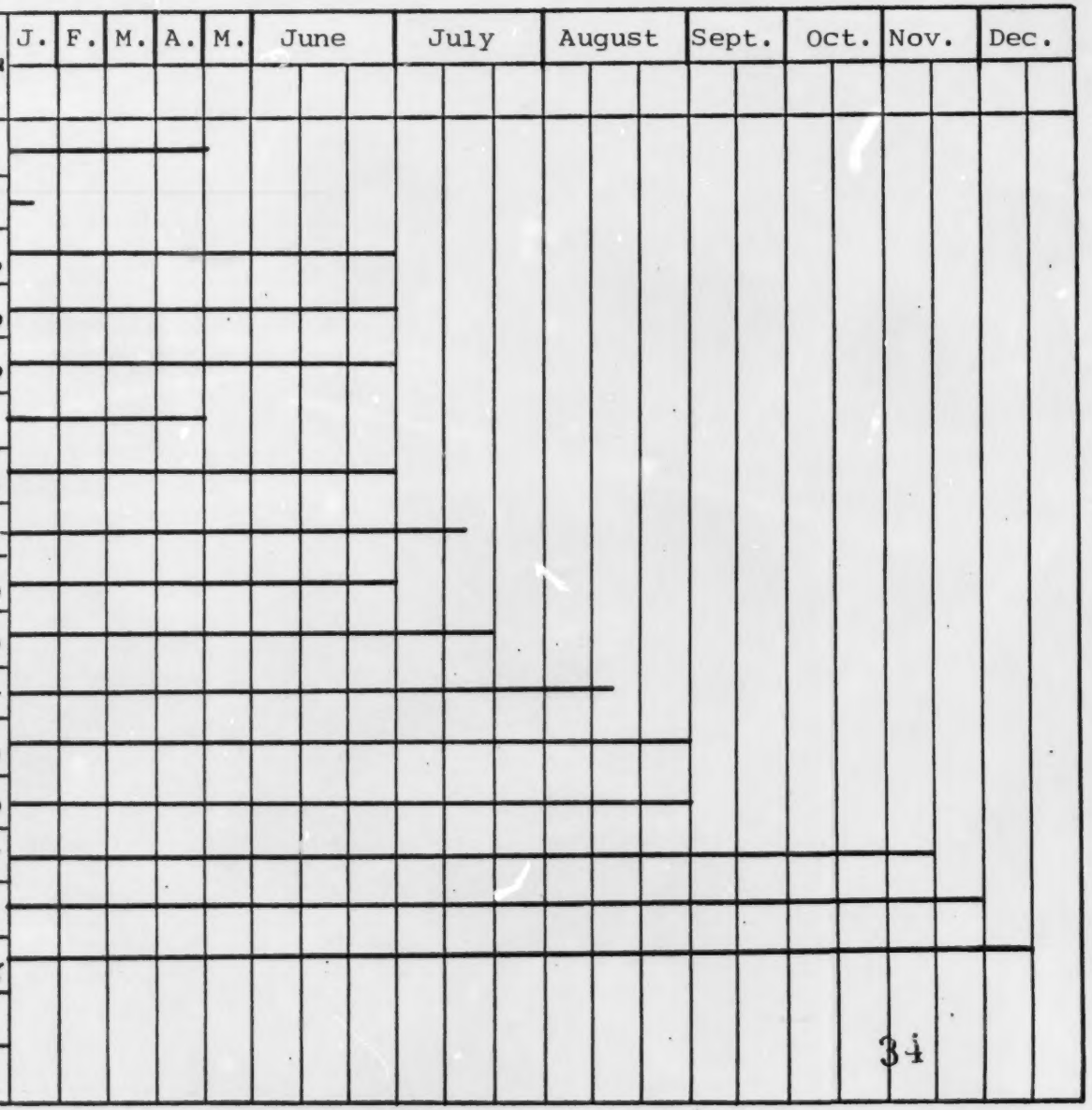

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Sample Session Evaluation

Directions: Please complete the following and hand to the session chairperson. Thank you for your valuable contribution to this session's evaluation.

1. Session Title: _____

2. Read each statement carefully and circle the number that is best descriptive of your reaction to the statement.

   Key: 1. Strongly Disagree (SD)
   2. Disagree (D)
   3. No Strong Feelings (NSF)
   4. Agree (A)
   5. Strongly Agree (SA)

		SD	D	NSF	A	SA
a.	The title represented the content of the session.	1	2	3	4	5
b.	The topic was of practical value.	1	2	3	4	5
c.	The presentation was well organized.	1	2	3	4	5
d.	The use of media was well integrated.	1	2	3	4	5
e.	The program schedule was maintained.	1	2	3	4	5
f.	The session offered new material.	1	2	3	4	5
g.	Participant questions were well answered.	1	2	3	4	5

3. Evaluation of presentation

a.	The presenter was well prepared.	1	2	3	4	5
b.	The presenter utilized a good delivery.	1	2	3	4	5
c.	The presenter provided for questions.	1	2	3	4	5
d.	The presenter was stimulating.	1	2	3	4	5
e.	The audio visuals used pertained to the topic.	1	2	3	4	5
f.	The graphics used were adequate.	1	2	3	4	5
g.	The media used stimulated discussion.	1	2	3	4	5

4.	This session increased my interest in this area.	1	2	3	4	5
5.	This session was a rewarding experience.	1	2	3	4	5

6. Your written comments on the back of this form are welcomed.

APPENDIX 3

Sample Conference Evaluation

Directions: Please complete the following and return to the Project Director at the conclusion of the conference. Read each statement carefully and circle the number that is best descriptive of your reaction to that statement. Your written comments are also welcomed.

Key:
1. Strongly Disagree (SD)
2. Disagree (D)
3. No Strong Feelings (NSF)
4. Agree (A)
5. Strongly Agree (SA)

		SD	D	NSF	A	SA
	Program Sessions					
1.	The orientation session was helpful.	1	2	3	4	5
2.	The sequence of the sessions was chosen wisely.	1	2	3	4	5
3.	The pairing of concurrent sessions was effective.	1	2	3	4	5
4.	The length of the sessions was adequate.	1	2	3	4	5
5.	The degree of participant interaction was about right.	1	2	3	4	5
6.	The topics of the conference sessions were valuable.	1	2	3	4	5
7.	There were sufficient handout materials at the sessions.	1	2	3	4	5
8.	The sessions offered me some practical ideas I can use in my everyday work.	1	2	3	4	5
	Overall Conference and Site					
9.	The Family-Conference format influenced my decision to make application to attend the conference.	1	2	3	4	5
10.	My interest in science education and science supervision, in general, has been stimulated by this conference.	1	2	3	4	5
11.	My overall feeling about the conference was good.	1	2	3	4	5
12.	The conference facilities were adequate.	1	2	3	4	5
13.	The lodging was satisfactory.	1	2	3	4	5
14.	The meals were satisfactory.	1	2	3	4	5
15.	The conference location was good.	1	2	3	4	5
16.	Registration for the conference was easy.	1	2	3	4	5
17.	The activity fee was reasonable.	1	2	3	4	5
18.	Sufficient free time was available.	1	2	3	4	5

APPENDIX 4

	SD	D	NSF	A	SA
19. My time in coming to the conference was well invested.	1	2	3	4	5
20. Pre-conference materials were adequate.	1	2	3	4	5
21. The social functions enhanced the conference.	1	2	3	4	5
22. The PEEC staff was friendly and cooperative.	1	2	3	4	5

Exhibits

23. The exhibits were relevant to the conference.	1	2	3	4	5
24. The exhibits provided useful information.	1	2	3	4	5
25. The "give-away" materials were helpful.	1	2	3	4	5

General Comments

Please state your general reaction to the following:

A. General reaction to the conference:

B. List three presentations that were most helpful.

1.

2.

3.

C. List three presentations that were least helpful.

1.

2.

3.

D. Suggestions for future conferences.

APPENDIX 4